

# Email Management Template Bundle



## Email triage Checklist

Ready to declutter your inbox and manage your emails more efficiently? Use this checklist to triage your emails like a pro and keep your inbox organised!

### Step 1: Quick Scan

- ☐ Open your inbox and quickly skim through the subject lines. Flag any urgent emails or important ones that need immediate attention.
- ☐ Archive or delete any obvious spam or irrelevant emails.

### Step 2: Categorise Your Emails

- ☐ Action Required – Emails that need you to take action (reply, complete a task, etc.). Follow-up – Emails that require a follow-up (set reminders for when you need to follow up).
- ☐ Read Later – Emails that can be read at a later time, but are not urgent.
- ☐ Archive/Store – Emails that are informative but don't require any immediate action.

### Step 3: Action Plan

- ☐ For Action Required emails: Decide on the next step (Reply, Delegate, Schedule time, etc.).
- ☐ For Follow-up emails: Set a reminder to follow up within 48-72 hours.
- ☐ For Read Later emails: Move these emails into a separate folder, such as “To Read” or “Research”.
- ☐ For Archive/Store emails: Move them to your archive folders for easy reference if needed later.

### Step 4: Delete the Clutter

- ☐ Delete any old or unnecessary emails that don't fall into any of the above categories.
- ☐ Unsubscribe from newsletters or mailing lists that are no longer relevant.

### Step 5: Set a Time to Respond

- ☐ Schedule specific blocks of time during your day/week to respond to emails in the Action Required category.
- ☐ Use your time wisely—avoid constantly checking your inbox. Set designated times to address emails!

# Email Management Template Bundle



## Folder & Filter Templates

These folder and filter templates will help you organise your inbox and keep it tidy.

### Folder Structure Example:

1. Inbox – For all new incoming emails.
2. Action Required – Emails that need you to take action (tasks, replies, etc.).
3. Follow-up – Emails that require a follow-up (set reminders for when to follow up).
4. Read Later – Emails you can read when you have more time (newsletters, interesting reads, etc.).
5. Client/Project Folders – Create specific folders for important clients or projects.
6. Archive – For emails you no longer need to take action on but may need for reference later.
7. Unsubscribe/Spam – For unwanted newsletters or spam.

### Filter Template Example:

1. Filter by Sender – Set up a filter that automatically moves emails from specific senders (clients, team members, etc.) to their designated folders.
2. Filter by Subject – Create a filter for emails with specific keywords or subjects (like “Invoice,” “Meeting,” or “Important”) to ensure they go straight to the appropriate folder.
3. Filter by Importance – Automatically flag high-priority emails so they stand out and are easy to find.

# Email Management Template Bundle



## Professional Auto-Response Template

Set up a professional auto-response for when you're out of the office or busy.

**Subject:** Thank you for reaching out!

**Body:**

Hi [First Name],

Thank you for getting in touch! I'm currently away from my inbox and may not be able to respond immediately. I'll make sure to get back to you as soon as possible.

In the meantime, if your matter is urgent, please feel free to [provide alternate contact info or instructions]. Otherwise, I'll respond to your email as soon as I return.

Thank you for your patience,

[Your Name]

[Business Contact details]

hello@reliablevaservices.com.au

0435 059 069

# Email Management Template Bundle



## Email Management Time-Blocking Calendar

Use this time-blocking calendar to schedule specific periods throughout your day dedicated to email management. This will help you stay on top of your inbox without getting overwhelmed.

### Daily:

- 9:00 AM - 9:30 AM – Check and respond to urgent emails. (Use your triage checklist!)
- 11:00 AM - 11:15 AM – Clear out new emails that have arrived. (Flag and categorise)
- 2:00 PM - 2:30 PM – Follow up on emails that require responses or actions.

### Weekly:

- Monday 10:00 AM - 10:30 AM – Organise and declutter inbox. Delete unnecessary emails and unsubscribe from unwanted lists.
- Friday 3:00 PM - 3:30 PM – Review any remaining emails in the “Read Later” folder. Decide if any should be archived or deleted.

### Monthly:

- End of Month – Archive emails from the last month and reorganise folders if needed.

**For questions or to learn more reach out to us!**

[hello@reliablevaservices.com.au](mailto:hello@reliablevaservices.com.au)

0435 059 069